## STATE OF HAWAII STATE PROCUREMENT OFFICE

SPO Vendor List No. VL 01-28 (SW) Includes Change Nos. 1 to 4 Revised 5/17/04

## INFORMATION TECHNOLOGY (IT): TECHNICAL REFERENCE, REPORTING AND ADVISORY SERVICES

(RFP-01-041-SW) March 1, 2001 to February 28, 2005

#### STATE'S COMMITMENT

Agencies of the following purchasing jurisdictions are required to purchase from this vendor list:

●Executive Branch

#### **EXCEPTION TO THE PRICE LIST**

When the use of the price list is not suited to an agency's purpose, the appropriate purchasing jurisdiction may grant an exception to purchase outside of the price list. For this purpose, Executive Branch agencies shall use SPO Form-5, "Request for Authorization to Purchase Outside of the Price List", available on the SPO Website, <a href="www.spo.hawaii.gov">www.spo.hawaii.gov</a>; click on "Forms for State Agencies" in the <a href="Hawaii Public Procurement Code">Hawaii Public Procurement Code</a>, <a href="Chapter 103D">Chapter 103D</a>, <a href="HRS">HRS</a>, menu.

#### POINT OF CONTACT

Procurement questions or complaints may be directed as follows:

	Point of Contact	<u>Telephone</u>	<u>Facsimile</u>
DAGS-SPO	Donn Tsuruda-Kashiwabara	586-0565	586-0570

IT questions and concerns relating to the use of this VL may be directed to ICSD through your department's DP coordinator.

**DAGS-ICSD** Barbara Tom 586-1913 586-1922

All complaints are to be made in writing and routed to the State Procurement Office. The written information should include the reason for the complaint and/or details or circumstances leading to the complaint. The Vendor Complaint/Evaluation form, SPO Form 12, is attached for your usage and also available on the web. These complaint forms shall be forwarded to ICSD for their information and file.

#### PURPOSE/INTENT OF THIS VENDOR LIST

The purpose or intent of this multiple-award Vendor List (VL) is to provide reference, reporting and/or advisory services to Information Technology (IT) managers in line with administration of IT, but not for services that will do IT activities toward developing a system.

#### **Definitions:**

- 1. <u>Technical Reference, Reporting (Research) Services</u>: Any service that can provide support for persons looking for data about any IT subject; used mostly to research aspects of IT in response to an assignment by management to help make informed IT decisions.
- 2. <u>Advisory Services</u>: Any service that can provide direct advice to management on IT matters. This can be provided by phone call or other means/media of access by the State to contractor experts/analysts.

#### **USE OF THIS VENDOR LIST**

Vendors on this list shall provide, at a minimum, access to a database of information that can be used as a reference to research and compare products or strategies and in some instances contain material related to Information Technology (IT). Access to this database shall allow agencies to make informed decisions and plan IT projects and activities with effective use of IT.

Agencies are advised that before contacting any of the vendors listed herein, agencies should contact their department's DP Coordinator to determine the extent of IT research and/or advisory services required. To varying degrees, the vendors listed provide the following IT research and advisory services:

- Expert technical advise;
- Technical information through web enabled access and retrieval, multimedia/on-line retrieval;
- Reference materials on CD-ROM, hardcopy, and diskette, etc.;
- Experience and recommendations of similar organizations;
- Industry focus reports;
- Research reports;
- Key trends in the IT industry;
- Current event information; and
- Audio and telephone consultation and conferences.

Agencies using this Vendor List are also advised that they may be asked to enter into a written agreement before services can be provided. The decision to enter into a written agreement with any of the listed vendors is left to the discretion of each user agency.

#### **APPROVAL REQUIRED**

Pursuant to AD 77-2, agencies of the Executive Branch must obtain the approval of the State Comptroller before submitting a purchase order for the services listed. Agency shall send a memo requesting approval to: **State Comptroller, Department of Accounting & General Services**.

Agencies of the executive department wishing to use consulting services must obtain prior approval from the Governor per budget instructions, as well as prior approval per AD 77-2 from the Comptroller.

#### LIST OF VENDORS

1. GartnerGroup

Contact Person: Dale Aiello

Address: 2600 Pualani Way #2205

Honolulu, HI 96815-3939

Telephone: (808) 531-5647 Facsimile: (808) 531-5781

e-mail: dale.aiello@gartner.com

2. META Group, Inc.

Contact Person: Jim Ison

1007 7<sup>th</sup> Street, Ste. 205 Sacramento, CA 95814

Telephone: (916) 447-8812 Facsimile: (916) 447-8814

e-mail: jim.ison@metagroup.com

3. Faulkner Information Services

Contact Person: Barbara Forkel

7905 Browning Road, Ste. 118

Pennsauken, NJ 08109 1-800-843-0460 ext. 102

Telephone: 1-800-843-0460 ext

Facsimile: (856)-662-0905

e-mail: <u>bforkel@faulkner.com</u>

#### **UNIT PRICES**

Prices shown in this vendor list are based on delivery of services to designated agencies statewide and include all applicable costs and taxes <u>except</u> the 4% Hawaii General Excise Tax (GET). Agencies are requested to add the 4% amount to their purchase order total. Vendors are aware that the tax to be charged shall not exceed the 4% rate (rounded to the nearest cent).

"SPO VL No. 01-28" should be noted on purchase orders issued against this vendor list.

#### **PAYMENT**

Section 103-10, HRS, provides that the State shall have thirty (30) calendar days after receipt of invoice to make payment. The State will not recognize any requirement established by the Contractor and communicated to the State after award of the contract, which requires payment within a shorter period or interest payment not in conformance with statute.

/s/ Robert J. Governs
Robert J. Governs, CPPB
Procurement Officer

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January 21, 2003

Robert J. Governs Procurement Officer State Procurement Office State of Hawaii P.O. Box 119 Honolulu, HI 96810-0119

Dear Sir;

The following, per your request, is a Gartner, Inc. update to our March 30, 2001 response to RFP-01-0410SW (SPO VL No. 01-28 Statewide) described in as "Price List for Furnishing to the State of Hawaii Information Technology (IT) Technical Reference, Reporting and Advisory Services." We believe that the State of Hawaii will greatly benefit from Gartner's world-class thought-leading research and related services. Gartner is uniquely qualified to serve as your business and technology research advisor

Gartner has had a State of Hawaii Price List since 1996 and has many satisfied State agencies as clients as well as the City of Honolulu and County of Hawaii.

#### **ABOUT GARTNER**

Gartner, Inc. is a research and advisory firm that helps more than 10,500 clients understand technology and drive business growth. With more than 20 years of experience, 1,200 research analysts and consultants and 4,000 associates in more than 90 locations worldwide, Gartner helps leading companies make smart decisions, recognize and seize new opportunities and move their businesses in the right direction through the powerful integration of our five core competencies.

#### RESEARCH

Gartner Research is the world's largest and most trusted source of business technology knowledge and insight. Gartner Core is a vital resource used by thousands of organizations to understand the most strategic and cost-effective ways to apply technology in support of their businesses. Gartner Dataquest is the definitive source of global market knowledge for the IT and telecom industries and is used extensively by technology suppliers and providers worldwide. GartnerG2 is a powerful growth research service designed specifically for business strategists and enables them to quickly grasp trends, analyze business models and identify growth opportunities that support strategic goals.

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#### CONSULTING

Gartner Consulting integrates results-oriented business strategy and real-world experience with the power of Gartner Research and Gartner Measurement, to help clients identify opportunities, avoid mistakes and understand the impact of technology on their business. At a time when alliances between major consultants and technology suppliers have clouded the landscape, Gartner Consulting remains resolutely objective and dedicated to helping clients achieve results with solutions that make sense.

#### **MEASUREMENT**

Gartner Measurement is a world leader in measuring for improved IT performance. Working with thousands of enterprises to maintain the largest and most accurate peer databases available, Gartner Measurement uses industry-standard tools and Gartner methodologies to accurately benchmark clients' performance, provide a ranking, then recommends the best strategies for improvement.

#### COMMUNITY

Gartner Community is the technology world's most respected community builder, bringing business and technology executives, managers and teams together for highly productive meetings, group sessions and conferences. Gartner Events provides the fullest calendar of leading global technology conferences, including Symposium/ITxpo, the Gartner flagship event. Gartner EXP offers CIO-level programs with personalized executive support, and Best Practices Groups allow managers and senior staff to share business and technology implementation experiences.

#### **NEWS**

Gartner News provides the consistency and reliability of Gartner research and extends it out to a wide variety of media. Content Alliances offer reseller relationships and affiliate marketing programs that are effective tools to market to client organizations. Gartner Connects supports news organizations with pre-packaged featured content to raise brand awareness and credibility for clients, and gartner.com leverages a state-of-the-art knowledge engine to allow clients to search through a broad spectrum of Gartner Research documents online.

This price list covers Research, Consulting, Measurement, Community, and News. If you have any questions please do not hesitate calling me at 531-5647. I look forward to continue our support of the State of Hawaii.

Sincerely,
Dale Aiello
Independent Representative
Gartner, Inc.

#### **Project Support and Company Information**

GARTNER, INC. IS A RESEARCH AND ADVISORY FIRM THAT HELPS MORE THAN 10,500 CLIENTS UNDERSTAND TECHNOLOGY AND DRIVE BUSINESS GROWTH. GARTNER'S BUSINESSES CONSIST OF GARTNER RESEARCH, GARTNER CONSULTING, GARTNER MEASUREMENT, GARTNER COMMUNITY AND GARTNER NEWS. FOUNDED IN 1979, GARTNER IS HEADQUARTERED IN STAMFORD, CONNECTICUT, AND HAS 4,000 ASSOCIATES, INCLUDING 1,200 RESEARCH ANALYSTS AND CONSULTANTS, IN MORE THAN 90 LOCATIONS WORLDWIDE. FISCAL 2002 REVENUE TOTALED \$907 MILLION. GARTNER HELPS LEADING ENTERPRISES MAKE SMART DECISIONS, RECOGNIZE AND SEIZE NEW OPPORTUNITIES AND MOVE THEIR BUSINESSES IN THE RIGHT DIRECTION THROUGH THE POWERFUL INTEGRATION OF FIVE CORE COMPETENCIES.

#### Research

Gartner Research is the source of insight for thousands of organizations to understand the most strategic ways to apply technology to transform their business. By leveraging the knowledge and advice only our size and experience can provide, our clients gain a true global perspective, identify growth opportunities in new and expanded markets and create the strategic goals that will move their companies ahead.

#### Consulting

Gartner Consulting provides clients with the critical objectivity and real world expertise to assess, evaluate, execute and manage the effectiveness and efficiency of their business and technology strategies. Backed by the power of Gartner Research and Gartner Measurement, our consultants help organizations identify opportunities, avoid extremely costly mistakes and understand the impact of technology on their business.

#### **Measurement**

Gartner Measurement maintains the largest and most accurate peer databases available to provide a competitive landscape to enable organizations to see where they stand. We identify opportunities to cut costs, increase productivity, streamline processes and better manage overall performance. Our clients see more clearly in all directions and continue to stay ahead of the technology curve.

#### Community

Gartner Community provides highly productive business and technology networking opportunities for senior executives around the world. Our leading global technology conferences, including Symposium/ITxpo, the Gartner flagship event, create an atmosphere of collaboration, insight and education on the critical issues facing the organization. Gartner EXP programs offer CIOs personalized executive support, and Best Practices Groups allow senior staff to share business and technology implementation experiences.

#### News

Gartner News offers immediate online access to Gartner research through gartner.com. Entire client organizations can use the Web site as a point of entry to retrieve Gartner research documents anywhere in the world. We know the right information at the right time is critical, and Gartner News provides the easiest and most immediate method of access to the foundation of Gartner knowledge. life cycle, drawing on key assets at every stage.

Gartner has developed the expertise, experience and scope to create a full continuum of services. You can turn to Gartner's published research or interface directly with the analyst community to get the advice you need to make and manage decisions. Insight is also available through Gartner's thought-provoking conferences and workshops, as well as through interaction with the Gartner extended community. Our unrivaled benchmarking capability and unique software modeling tools can help you measure and manage your initiatives.

You can also accelerate your relationship with Gartner by entering into a more collaborative arrangement where Gartner experts work directly with you to address especially complex or challenging issues. In these cases, seasoned Gartner professionals will provide you with customized consulting designed to address your business and technology issues.

#### Information on Technical Reference, Reporting and Advisory Services

Information is presented on the following Gartner products and services:

- Gartner Research
  - Core Research
  - Gartner G2
- Gartner Consulting
  - Public Sector Expertise
  - Enterprise Solutions
  - IT Strategy & Management
  - Architecture & Technology
  - Human Capital Management (People 3)
  - General Advisory Services
- Gartner Measurement
  - Rapid Assessments
  - Decision Tools
  - Performance Management
  - Traditional Benchmarks
- Gartner Community
  - Events
  - Executive Programs (EXP)
- Gartner News
  - Gartner Multimedia/Talking Technology

## Gartner Core Research SERVICE DESCRIPTION

Core Research is a service that provides research and advice about information technology for decision-makers. Gartner Core Research provides clients with the base of knowledge and advice needed to capitalize on IT technologies and markets.

There are two levels of named User access to Core Research: Reference and Advisor.

#### 1. DELIVERABLES

- a) Core Research Deliverables for Reference Users include a range of written deliverables, such as:
  - **Spotlights** which reflect hot client issues, consider the issues from several different perspectives and tie together research from all the Core Research Deliverables.
  - Special Reports which cover underlying research themes that cut across technology or
    industry-specific research, or provide in-depth strategic analysis of trends, industry
    developments, vendors, products and services.
  - Research Notes which focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  - Perspectives/Research Briefs which provide analysis and commentary on key technologies, companies, products, market opportunities, events, user and distribution trends, and strategic issues in the IT and telecom market segments tracked by Gartner Dataquest.
  - Executive Summaries which are top-level analysis and recommendations from Gartner Dataquest Cluster research reports.
- b) Core Research Deliverables for Advisor Users include the following items, in addition to the Core Research Deliverables for Reference Users:
  - Standard Analyst Inquiry which provides named Core Research Advisor Users access to Gartner Core Research analysts through Standard Analyst Inquiry, as required for their individual business purposes for the benefit of Client.
  - Audio Conferences which are periodic "telephone meetings" on pressing, timely issues. Gartner analysts speak on these topics and then poll the listeners.
  - **Talking Technology** which is currently a monthly audiocassette or CD-ROM that provides an executive summary focusing on hot IT issues.
  - Theme Conference Ticket which is a ticket for one employee to attend one of Gartner's theme conferences.

Services are to be used for each User's individual business purposes for the benefit of Client. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

## Gartner G2 SERVICE DESCRIPTION

GartnerG2 is a strategy research service dedicated to helping business strategists guide and grow their businesses. GartnerG2 provides data and insights related to companies, markets, and the external forces affecting businesses, today and in the future.

There are two levels of access to GartnerG2Research, Reference and Advisor.

#### 1. DELIVERABLES

- a) GartnerG2 Deliverables for Reference Users include a range of written research, such as:
  - Research Reports which are knowledge points to support strategic planning decisions with in-depth analysis.
  - Question and Answer (Q&A) which are the most frequently asked questions concerning growth challenges and opportunities, coupled with our analysts' point-of-view.
  - Hot Reports which list business issues that are currently at the top of decision making priority lists.
  - Grow Smart Resource Center which is an assortment of perspectives that encapsulate the trends of business strategy as they relate to technology.
- b) GartnerG2 Deliverables for Advisor Users. In addition to the GartnerG2 Reference Deliverables, GartnerG2 Research Advisor Deliverables include:
  - GartnerG2 Standard Analyst Inquiry which provides the named GartnerG2 Research Advisor Users with access to GartnerG2 analysts through Standard Analyst Inquiry, as required for their individual business purposes for the benefit of Client.

Services are to be used for each User's individual business purposes for the benefit of Client. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

#### **GARTNER CONSULTING**

**Gartner Consulting**: Consultants who combine the rigor of research with the wisdom of practical experience.

Within the four walls of Gartner, we have the greatest depth and breadth of technology knowledge in the world. Combine that with senior, experienced consultants with an average of 10 years of working experience and you have an army of people who can help you assess, strategize, evaluate and select, execute and manage the effectiveness and efficiency of your initiatives. Furthermore, not only do we help organizations optimize the effectiveness and efficiency with which they operate through the use of technology, but we also work with people who bring technology and technology related services and products to market - and we provide them with strategic services to help them obtain competitive advantage - and dominate their market or industry.

With the broad scope of technology issues facing state and local government today, having an objective ally is indispensable. Our team of dedicated State and Local Government consulting experts realize that effectively utilizing IT is complicated, particularly given the unique issues and challenges within the public sector.

For over 20 years through hundreds of successful engagements, we have been providing insight to city, county, and state agencies on how new technologies can be used to achieve mission-critical goals. We provide agencies with the tools and services necessary to successfully plan, evaluate, execute and manage their most vital initiatives.

#### • Enterprise Solutions:

Enterprise Solutions helps CIO's improve their companies. CRM, enterprise management, supply chain management, collaborative commerce; knowledge management, privacy and security, systems automation and rationalization; legacy scalability, asset management, integration mapping; corporate e-business imperatives.

In order to optimize core business functions and processes like CRM, KM, SCM, and general enterprise-wide resource management - you've got to consider the potential impact of technology. We'll work with you to address the business issues and improve processes, organization and functions and then enable those improvements through the effective and efficient application of technology. Gartner's Enterprise Solutions Practice can help in the following areas:

• **E-Government**- Just as e-business has made it imperative for business to reconfigure their relationships and interactions with customers, suppliers and partners, so promises e-government. E-government is all about optimizing service, better constituency participation and generally more efficient governance. Rapidly expanding Internet usage coupled with the right mix of electronic G2B, G2C and G2G initiatives offer a multitude of opportunities for government to better serve its constituents while cutting costs.

The Internet is the ideal place for citizens to participate in rule- and regulation-making, legislation, and even judicial action. To that end, governments must envision a citizenry with universal Internet access and create plans not only for required services, but also for the changes in the means, processes and

infrastructure to make it happen.

In the connected economy, no one understands the vital impact new technologies will have on the economy, business and government better than Gartner.

- Public Safety- Gartner Consultants work with the state and local government to help them
  address critical issues public safety and improve effectiveness and efficiency through the
  application of technology to:
  - Criminal Law & Justice
  - Law Enforcement
  - Fire & Life Safety
  - Wireless Systems & System Integration
  - General Government The public sector has unique needs, processes, organizational structures, budgeting and procurement policies and methods for demonstrating value. We recognize the uniqueness of government and other public sector organizations, and many of Gartner's consultants have deep experience working inside, and with, the public sector. Their public sector knowledge and experience is combined with our ability to provide Strategic Sourcing, Enterprise Solutions, IT Strategy & Management and Architecture & Technology solutions to deliver great value to government agencies and their constituents.

Furthermore, Gartner Consulting has worked with many State & Local, Federal and International governments to incorporate and enable the concepts of e-government. We have extensive knowledge of the requirements, business processes, solutions, and vendors in key areas such as public safety, justice, health and welfare, and have a successful track record of identifying, planning for, and assisting in the implementation of the technologies and applications best suited to optimize an agency's ability to provide these services.

- E-Supply Chain Assessment E-Supply Chain Assessment provides your client with a fast, comprehensive assessment of their supply chain's current e-business effectiveness and future positioning. Although most organizations will claim that their use of information technology is to enable the business, nearly all organizations are challenged to do so effectively. The goals and metrics of the organization, and the IT function, are often different and sometimes contradictory. This *Gartner Consulting* project ensures that the two are linked harmoniously.
  - Enterprise Resource Planning Re-implementation of ERP systems-in particular, those which were implemented prior to Year 2000, and those which have not been upgraded since then-is a growing trend. Such major projects can carry significant risks, and organizations need to address these risks prior to starting, and to monitor them throughout the life of the engagement to increase the likelihood of success. Gartner Consulting's Sourcing and Implementation Assistance Services as well as our Project Oversight and IV&V services will ensure that such projects remain on track and achieve their goals.

• HIPAA- The Health Insurance Portability and Accountability Act (HIPAA) was signed into law and now the healthcare industry is now faced with the major challenges of complying with HIPAA Administrative Simplification Federal regulations during the next three years. The first regulation mandates the use of standard formats for the most common electronic data interchange (EDI) transactions in healthcare, and promises to save the industry up to \$73 billion per year in reduced administrative expenses. The other two regulations define national standards for the privacy and security of medical records.

Gartner can assist agencies through the entire process of preparation for compliance with HIPAA. Many of our expert consultants and analysts are educating clients on HIPAA regulations and they are conducting a myriad of HIPAA-related projects across the country.

HIPAA collateral has been released for the Public Sector Sales force and many new projects will also be unveiled shortly. The new HIPAA collateral includes: HIPAA Internal Navigation Guide, Scope Sheets (HIPAA Education and Awareness, HIPAA Readiness Assessment, HIPAA Independent verification and Validation Services), HIPAA SLG Capabilities Brochure and HIPAA Talk Track. New Projects already in-progress include an External HIPAA Awareness Campaign, content on gartner.com, Hot Issues in HIPAA, and a list of recent HIPAA and healthcare press releases--and much more to come!

- Web Diagnostic Gartner's Web Diagnostic solution delivers a comprehensive, comparative assessment of enterprise Web sites on the key measures of usability, design and effectiveness. Our team of highly experienced consultants utilize a combination of Web site best practices, analytical tools and methodologies to significantly improve the overall user experience for site visitors.
   Web Diagnostic consultants will enable clients to:
  - Compare the strengths and weaknesses of their Web site relative to those of competitors
  - Improve customer service and/or generate sales leads
  - Establish benchmark measures of performance that can be tracked over time for continuous improvement.

#### • IT Strategy & Management

IT Strategy & Management helps IT managers run their departments.

Maturity assessment studies, business-IT alignment strategies, technology mapping and planning; architecture design and development; technology assessment, evaluation and selection; business effectiveness measurement and benchmarking.

Management consulting for your IT organization. Gartner Consultants will work to make sure your IS organization is operating with maximum effectiveness and efficiency and delivering services that facilitate and enhance your organizations ability to meet its objectives.

 IT Balanced Scorecard- IT Balanced Scorecard develops alignment between business strategies and IT objectives and secures the participation and

- buy-in of business executives to support long-term actions to improve the effectiveness and efficiency of IT.
- IT Assessment and Prioritization The IT Investment Assessment & Prioritization is structured to help IT executives conduct a high-level inventory of all IT projects and activities, align costs with that inventory and then align major activities with business objectives.
  - A rapid quantitative assessment is included to baseline costs in at least four major functional areas driving the majority of the projects and activities inside the inventory. This engagement may be expanded to include additional functional areas and/or benchmarking against costs incurred by select peer groups.
- Project Oversight To ensure success, government agencies need an objective, thirdparty oversight of system implementation projects and procurements, including independent reviews of project schedules, resources, costs, risks and key deliverables.
- Disaster Recovery and Business Continuity Planning Gartner Consulting Public Sector Practice has extensive experience and expertise in helping governments ensure their IT investments are aligned with their business objectives and managed to deliver maximum value back to the government. Gartner also works closely with public sector agencies to develop and design architectures to support those investments—analyzing technology infrastructure, people, process, applications, data and location. Gartner's comprehensive expertise is leveraged to help our public sector clients achieve business continuity.
- Architecture and Technology
   Architecture & Technology helps optimize IT infrastructure.

Current technology assessment, strategy development, gap analyses; design and develop architecture and infrastructure framework; analyze and select appropriate technologies, partners and providers; program manage

Gartner Consulting will help you get technology done. Once you've got a technology strategy in place, we help you design and develop an architecture that supports it - we walk you through the evaluation and selection of the best technologies and services to support that architecture, we help make sure it all gets executed successfully and we help you put programs in place to insure continuous improvement.

- Telecom Network Risk Assessments Gartner will help you understand and identify
  where you have the greatest exposure to potential disruptions in voice and data services
  and work with you to mitigate those risks and ultimately, minimize potential business
  impact. Our consultants and analysts also have great expertise and experience working
  with organizations to make sure they have sourced their voice and data services in the
  most effective and efficient manner possible and in a way that protects the organization
  and again, minimizes risks.
- Security and Privacy Gartner consulting works with many enterprises in both the
  commercial and public sector to help them ensure security spend is used effectively and
  efficiently. Our consulting organization regularly conducts assessments and reviews of
  current security programs and compares them to Gartner best practices, industry
  standards and TCO frameworks. We also work with many organizations to

develop an over-arching security strategy and plan that is aligned with current threat and vulnerability analysis and is aligned with the current risk profile.

- Strategic Sourcing Strategic Sourcing is defined as the dynamic delivery of both internal and external business and information technology resources and services to achieve business objectives.
  - Sourcing Strategy
  - Evaluation & Selection
  - Contract Development
  - Sourcing Management

#### people<sup>3</sup>

#### Human Capital Management

Human Capital Management Solutions helps manage people resources.

Strategies; leadership, work process, culture, org. structure, job design, competencies; sourcing, performance management, career development, reward and recognition; recruitment and retention, pay planning, intranet-based solutions implementation.

Gartner's Human Capital Management Solutions are powered by a Gartner Company,. Our consultants, who specialize in this area work with clients to enhance their ability to attract, recruit, develop and retain their workforce. We work with clients to drive the mission, vision and value of their HR function - to optimize their organization and work processes, develop competency models and career development programs and to put performance management to work in their enterprise.

- **people**power<sup>TM-</sup> an intranet-based platform developed by **people**<sup>3</sup>, is the only software solution in the marketplace that links the most critical elements of human capital management, including: career development, resource planning, learning, performance management, sourcing and compensation.
  - These critical elements, represented in separate **people**power<sup>TM</sup> modules (**career**power<sup>TM</sup>, **resource**power<sup>TM</sup>, **learning**power<sup>TM</sup>, **performance**power<sup>TM</sup>, **sourcing**power<sup>TM</sup> and **compensation**power<sup>TM</sup>), provide the client's human resource department and organizational leaders the necessary tools to effectively manage the recruitment, development, performance, deployment and retention of their employees.
- Human Capital Management Consulting Through a series of consultative engagements conducted by people<sup>3</sup>, We can assist in the development of an environment conducive to recruiting, developing, managing and retaining professionals. Our team of consultants is uniquely qualified to provide the requisite counsel and tools to help your client address their human capital management challenges. Our solutions are custom tailored to your client and their unique culture, incorporating our vast experience, databases of information and knowledge of best practices.

General Advisory Services - Advisory Services helps with special challenges.

Customized services in specialized areas such as emerging technologies, patents, prototypes, and other defensible investments.

Gartner Consulting also provides clients with rapid, objective and expert analyses and recommendations. This type of consulting is very customized and client-driven and is often appealing to CIOs/CTOs and their direct reports as well as people interested in making investments in new technologies, technology markets or technology related service providers.enterprise.

#### **GARTNER MEASURMENT**

**Gartner Measurement -** A variety of data, tools, and services to help you measure, understand, and manage your performance

Ever changing technology environments, the diversity of today's business requirements, and an economy that is in a state of flux require IT organizations to find new ways to measure their organization's information technology. Gartner Measurement's Rapid Assessments, Decision Tools and Performance Management programs provide the consistent, repeatable and robust methodology and approach your clients need today.

- Rapid Assessments allow quantitative metrics to be quickly taken and compared with
  industry peers; provides cost and service comparisons and highlights areas of improvement.
  Rapid Assessments can identify your clients' opportunity areas in just six weeks. Their
  commitment to the intensified process will give them on-site assistance from one of our
  seasoned analysts to streamline the often overwhelming and confusing task of data
  collection and validation. Gartner offers Rapid Assessments for:
  - AD Process Capability This replacement of the SEI Capability Maturity Model
    Assessment (CMMA) CMMA offering expands the product portfolio for Capability
    Maturity Model® assessments. It now includes both formal and informal internal
    assessments of Application Development processes, as well as external assessments
    for potential bidders and for in-progress application development outsourcing
    engagements.
  - Contact Center The Rapid Assessment for Contact Center service assists contact
    center managers in improving the management of multipurpose operations serving a
    variety of constituencies. Using Gartner's TCO Chart of Accounts, contact center
    managers can understand the trade-offs among cost, service levels and customer
    satisfaction. Furthermore, the analysis provides decision support for staffing and
    outsourcing issues. Results may include a determination that your client's contact center
    is effective as currently configured or that greater investment in resources may be
    required to build a world-class organization.
  - Customer Satisfaction This assessment service establishes a baseline for customer satisfaction, prioritizes issues and opportunities, and focuses on opportunities to increase satisfaction levels.
  - Data Networks This comparative assessment analyzes data networks from an efficiency, i.e., cost, and effectiveness perspective. Services delivered are measured

against business requirements to understand the trade-off between cost and performance.

- **Distributed Computing** This comparative assessment evaluates the costs of owning, using and procuring IT distributed computing assets over time.
- Enterprise Operations Center This comparative assessment uses the Total Cost of Ownership (TCO) model to analyze the enterprise computing environment enabling insight into the costs and performance of mainframe and midrange server platforms
- Enterprise SAP This comparative analysis covers the use and support of SAP.
   Comparisons are made to SAP module configuration, ongoing applications support, infrastructure management, service levels and end-user satisfaction.
   SAP is the leading ERP solution in the world today. Gartner Measurement has expanded its Rapid Assessment portfolio to include the Enterprise SAP Assessment (ESAP). The ESAP Assessment covers both SAP R/3 and mySAP.com, thereby providing complete coverage of the SAP offerings. If your client uses SAP, Gartner Measurement can directly help them to improve both their cost efficiency and their effectiveness.
- Enterprise Storage Management This comparative assessment uses a total cost of ownership (TCO) strategy to analyze the enterprise storage environment, enabling insight into the costs and performance of enterprise data storage systems
- Help Desk The Rapid Assessment for Help Desk service assists help desk managers
  in improving the management of multipurpose operations serving a variety of
  constituencies. Using Gartner's TCO Chart of Accounts, help desk managers can
  understand the trade-offs among cost, service levels and customer satisfaction.
  Furthermore, the analysis provides decision support for staffing and outsourcing issues.
  Results may include a determination that your client's help desk is effective as currently
  configured or that greater investment in resources may be required to build a world-class
  organization.
- Network Capacity Planning The Network Capacity Planning product has been
  developed to address the network capacity planning needs of enterprise and service
  provider network operators. It can be completed in six to eight weeks from the time of
  the on-site project initiation meeting. Some lead time is necessary between the signing
  of the contract and the project initiation meeting for project management coordination
  and scheduling with the client.
- Total AD Performance This comparative analysis provides a combined quantitative
  and qualitative assessment of applications development and support activities, including
  a comprehensive review of practices against the industry-standard Capability Maturity
  Model for Software® to assist managers in analyzing business needs and computing
  ROI for process and technical improvements in AD capability and technology.
- Total IT Expenditure This comparative assessment provides an evaluation of performance in all key IT functional areas and identifies those functional areas that offer the greatest opportunities for improved performance.
- Voice Networks This comparative assessment analyzes voice telecom services from efficiency, i.e., cost, and effectiveness perspectives. Services delivered are measured against business requirements to understand the trade-off between cost and performance.
- Web Hosting Given today's business climate, many enterprises are faced with budgetary pressures and cost cutting, showing returns on investments,

communicating internal value among business units and outsourcing threats. As Webbased applications increase in importance to the business, challenges also increase in terms of performance, complexity and improving cost-efficiencies.

The Rapid Assessment for Web Hosting is designed to measure and compare the cost-efficiency and performance of the Web hosting environment as delivered by an IS organization to its business units and end users. The focus is on building a spending profile, understanding the business objectives and dynamics of the hosting environment as well as determining and comparing the cost competitiveness and service-level performance. Gartner also can review chargeback rates for the hosting services relative to industry or market rates.

#### **Decision Tools**

Gartner Decision Tools deliver software applications, services and methodologies which perform cost of ownership analysis, enable users to calculate and compare returns on investment, and make better faster more cost effective vendor selections. By understanding the total cost of ownership, organizations are able to reduce costs dramatically while improving operational efficiency. By understanding the return of technology investments, you are equipped with data to support your organization's IT investment strategy. Decision Tools also provide an ideal way to evaluate and select vendors, and strengthen negotiations.

#### • Cost Management -

- Provide a consistent framework to calculate and measure true Total Costs of Ownership even though today's environments are in a perpetual state of change.
- Compare your operation(s) in order to better understand and control the factors that can drive up overall costs.
- Help balance exploding customer demands and expectations against the neverending need to control costs.
- Improve planning, budgeting and forecasting processes by allowing you create and model "what if" TCO scenarios.
- Identify TCO performance trends by assessing and tracking TCO over time.

#### Investment Planning –

Enterprises today are faced with an overwhelming number of options for reducing costs and are finding it increasingly difficult to decide where to invest often-scarce resources. While research has shown that the introduction of innovation can deliver business value, the cost of implementation can also be significant and may, in many cases, outweigh the benefits.

Our **Total Value of Opportunity (TVO)** product leverages the Gartner Business Performance Framework to allow investment decisions and evaluations to occur within a common language between technology and the business.

Gartner's Investment Planning models analyze the impact of innovations that are of strategic importance to today's IT managers and buyers.

Vendor Selection - Decision Tools for Vendor Selection is a unique, dedicated service
designed to help organizations make better, faster and more cost-effective decisions
regarding IT product evaluation and selection and to provide detailed market intelligence
for the vendor community.

Enterprises purchase this service to make better, faster and more cost-effective decisions regarding IT product evaluation and selection.

#### **Performance Management**

Performance Management offers expert analysis and qualified opinion on key performance indicators with comparison to the largest and most current IT measurement database. Performance Management services make sure you are doing the right things and you are doing them right.

- A clearly defined and measurable set of IT goals within the context of the business
- A mechanism for collecting reliable data to assess performance against these goals
- Comparisons against industry best practices and external benchmark data Methods and tools to analyze performance shortfalls and prioritize remedial actions

#### For IT Outsourcing:

- Competitive Bid Assessment The Competitive Bid Assessment (CBA) evaluates the market price for IT services as if they were provided to the service recipient (SR) by a service provider (SP). The price and services are compared with a peer group of similar IT environments. CBA provides a quick answer to the question, "Is this a good market price for the services?"
- Outsourcing Financial Assessment (OFA) Evaluates the price and quality of outsourced services provided to the service recipient (SR) by a service provider (SP). The price and services are compared with a peer group with similar IT environments. OFA answers the question "Do we have a good financial arrangement?"
- Web Hosting Competitive Bid Assessment (CBA) evaluates the market price for Web
  Hosting services as if they were provided to the service recipient (SR) by a service provider
  (SP). The price and services are compared with a custom peer group of similar hosting
  environments. The CBA provides a quick answer to the question, "Is this a fair market price
  for the services being proposed?"
- Web Hosting Outsourcing Financial Assessment This comparative assessment is designed to measure the market price and quality for Web hosting services. The price and services are compared with a custom peer group of similar hosting environments. This assessment provides an answer to the question, "Is this a fair market price for the services delivered?"

#### **Gartner Community**

Bringing executives together to learn, share experiences, and solve problems. Gartner Community brings people together in a multitude of ways, both on and offline. Community offerings enable executives to internalize and use the thought leadership of Gartner for their specific environments and challenges. From one-on-one sessions with analysts, to interactive group meetings with peers, to full-scale theme conferences, Gartner brings thousands of IT and business professionals together to exchange ideas and solutions, and to learn from others successes and mistakes. Our Community services truly extend Gartner's research to new levels of understanding and knowledge for our clients.

- Events Gartner offers the world's most comprehensive array of technology conferences for business and IT professionals. Attendees immerse themselves with global thought leaders, peers, and technology vendors to gain actionable advice.
   Gartner conferences are highly regarded among IT and business professionals worldwide because our unbiased content-rich sessions, tutorials, analyst One-on-Ones, Best Practices Forums, vendor demonstrations and keynote presentations are all developed to provide immediate solutions to the IT challenges, issues and opportunities facing your client's enterprise.
- Gartner Executive Programs (EXP) Gartner EXP provide personalized services to CIOs.
  Special program directors offer one-on-one counsel at anytime on any issue. Members
  participate in exclusive research and forums with peers, senior analysts, and EXP
  researchers
  - Technology is moving so fast, it takes your breath away. But anticipation is the real art of IT. It lets you lead where others follow. That's what Gartner EXP is designed to do, for the CIO or business executive whose innovating with technology. The aim of Gartner EXP is to ensure that its membership are the best informed IT executives in the world, getting the information, advice and support that they need, both from Gartner and from each other.
- **EXP Club** is designed for the Executive Business CIO who has an eye on technology but is more focused on the role of the IT function in the business. Your clients want big ideas and updates on innovative uses of technology. Most importantly, they want customized research that puts IT issues in their own business context. EXP Club is like having the best researchers and advisors at your desk. Our customized service is designed to fit perfectly with the lifestyle and needs of the business-focused CIO.
- EXP Premier is a one-stop-shop; a comprehensive, definitive resource that will provide CIOs/CTOs with exclusive analysis and reports, personalized access to Gartner research specialists, inspirational roundtables, and a variety of networking events.
   This service is designed for the technology management oriented CIO/CTO who knows it is not possible to keep up with rapid changes in technology nor with the management techniques required to deploy it.

#### **Gartner News**

Delivering Gartner insights in new forms to new audiences.

- Gartner Multimedia These products contain easy-to-digest executive (audio and video) summaries covering the most important issues in IT. Each program provides the best advice on key IT topics and how business goals can be achieved with IT. Available via cassette, CD, RealAudio, CD-ROM or video, clients can leverage their time while gaining knowledge about the role IT plays in today's business world.
  - Talking Technology is the perfect fit for senior IT professionals and IT workers, whether in consulting, sales, or on the IT staff. In-depth interviews with Gartner analysts explore the most pressing questions for each IT issue and concisely summarize the best advice for enterprises that strive for success.

#### **PricinG**

#### **Gartner Core Research:**

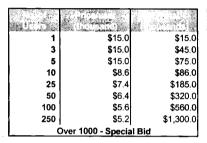
#### REFERENCE SEAT LICENSE

ord fyr off gran				
1	\$9.0	\$9.0		
3	\$9.0	\$27.0		
5	\$9.0	\$45.0		
10	\$7.0	\$70.0		
25	\$4.8	\$120.0		
50	\$3.9	\$195.0		
100	\$2.6	\$260.0		
250	\$2.3	\$575.0		
Over 1000 - Special Bid				



- Access to all Gartner Core Research Focus Areas
- Research formerly known as RAS research (except HCMO reports)
- Research formerly known as Datapro research (except Attack and Defend and Competitive Databases)
- Broadly targeted Gartner Dataquest research
- NOT included: Gartner Dataquest Clusters, QStats and GartnerG2

#### **ADVISOR SEAT LICENSE**





- Access to all of the written research as Reference Level PLUS:
- Unmetered/Standard Analyst Inquiry
- Talking Technology Series (one set per Advisor User)
- (Talking Business may be substituted for Talking Technology)
- Audioconference participation
- One Theme conference ticket per Advisory User

#### Gartner G2:

GartnerG2	Advisor		
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and the second of	T. HUUSA		
1,		19.0	19.0
3		12.0	36.0
5		10.0	50.0
10		8.0	80.0
25		6.0	150.0
50		6.0	300.0
100		6.0	600.0
250		6.0	1500.0
Over 1000 - Spe	ecial Bid		

Content:

#### **Gartner Consulting**

All Consulting engagements governed by Appendix D -Master Consulting Services Agreement

#### Hourly rate by position:

Managing Vice President	\$557
Vice President, Team Leader	\$539
Vice President	\$519
Director, Team Leader	\$454
Director	\$431
Manager	\$356
Senior Consultant	\$282
Consultant II	\$208
Consultant I	\$133
Analyst – Vice President	\$519

<sup>-</sup> Access to all of the written research as Reference Level Bitterion

<sup>-</sup> Unmetered/Standard Analyst Inquiry to GartnerG2 analysts

Analyst – SAS	\$1,063
Stringer	\$303

In addition to professional fees, Consulting engagements also require reimbursement of expenses incurred in the course of conducting the engagement.

Human Capital Manag	ement So	lu tion s
		Additional Copy
Segment of Consulting Engagement		price (\$US)
	Varies	
	depending on	
Human Capita! Management	size and	
Consulting	scope of	
IT Contractor Compensation Study	engagement	
IT Market Compensation Study	\$2,000	\$800
IT Market Compensation Study	\$2,900	\$290
(Participant) w/3 Qtrly Trending		\$150 for study, \$5
Reports	£1 500	for trending report
IT Market Compensation Study w/3	\$1,500	
Qtrly Trending Reports	¢2.750	\$290 for study, \$5
any frending Kepolis	\$3,750	for trending report
IT Market Componentian Ct. 1		\$800 for con
IT Market Compensation Study w/3 Qtrly Trending Reports + IT		survey, \$290 for
Contractor Comp Survey	0.1	study, \$50 for
Contractor Comp Survey	\$4,750	trending report
T Moskot Comment		\$800 for con
T Market Compensation Study + IT		survey, \$290 for
Contractor Comp Survey	\$3,900	study
IT Benchmark Job Compensation		
Report	\$350	N/A
Coustom IT Benchmark Report	\$700	N/A
	<b>-</b>	N/A
IT workforce perspective	\$23,500	N/A
IT Workforce Strategic Review	\$65,000	N/A
	Ψ00,000	N/A
care erp ower Module	\$95,000	N/A
	20% of initial	
careerpower Maintenance Charge	cost	N/A
Additional careerpower Seats		
1 - 299	\$100/seat	N/A
300 - 599	\$95/seat	N/A
600 - 1,199	\$90/seat	N/A
1,200 - 2,499	\$88/seat	N/A
2,500 - 2,999	\$85/seat	N/A
3,000 - 3,499	\$82/seat	N/A
3,500 - 3,999	\$80/seat	N/A
4,000 +	Call people 3	N/A
	Price varies	-
	depending on	
Bassura	client	
Resourcepower	requirem ents	N/A

#### **Gartner Measurement**

Total IT Expenditure and	Information Technolog	y Customer Satisfaction	(ITCS)
	STANDARD ITOA Price	Standard ITCS Price	
Four Modules	\$55,000	\$56,000	
Add-ons to ITOA (7,000 each)			
9 modules	\$90,000	\$45,000	
8 modules	\$83,000	\$45,000	
7 modules	\$76,000	\$45,000	
6 modules	\$69,000	\$45,000	
5 modules	\$62,000	\$45,000	
4 modules	\$55,000	\$45,000	
IT Customer Satisfaction (ITCS)			
Base - 500 questionnaires		\$45,000	
Additional 500 questionnaires		\$12,000	

Rapid Assessment Services			
Product	Price		
Rapid Assessment for Distributed Computing	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Enterprise Operations	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Contact Center	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Data Networks	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Help Desk	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Voice Telecom	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Total IT Expenditure	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Customer Satisfaction	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Application Dev & Support	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Enterprise Storeage Mgmt	\$55,000 (includes the first-year license to the TCO Manager software)		
Rapid Assessment for Network Capacity Planning	\$55,000 (includes the first-year license to the NCP software)		
Rapid Assessment for SAP	\$55,000 (includes the first-year license to the TCO Manager software)		
Each Additional View	\$ 15,000.00		
Additional User onesite analyst day	\$ 3,500.00		

Ability to do rapid assessment is scoped in the discovery phase of a project. Some organizations or projects that are more complex may not qualify. If clients do not qualify for Rapid Assessment, the engagements may still be undertaken but the timeline will be lengthened to accommodate the complexity of the project.

In some instances the blending of several studies can be done on a customized basis due to the requirements of the State of Hawaii in the discovery phase.

#### **Decision Tools For Vendor Selection:**

\$25,000
\$35,000
\$25,000
\$25,000
\$25,000
\$45,000
\$25,000
\$25,000
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\$25,000
\$45,000
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\$35,000
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\$35,000
\$25,000
\$25,000
\$15,000
\$25,000
\$25,000
\$25,000
\$25,000

#### **Decision Tools for Vendor Selection - STRATEGIC LICENSE PRICING**

Using Strategic Licensing a client may swap models during their license period. Thereby maximizing their use of Gartner Decision Tools for Vendor Selection across multiple decisions. Strategic licenses are ONLY available to non Vendor clients **Strategic License Type** 

\$45,000

attendee

00.00

Decision Tools for Vendor Selection SL-1 (1 model) \*

TCO Manager Enterprise Operations CenterWorkshop

TCOESM - TCO Manager Enterprise Storage Management TCOESR - TCO Manager Enterprise Storage Management Review

TCO Manager Enterprise Storage Managment Workshop

license holders

\*Note: CRMAS and ERPS models are not available to SL1

noonoo nolaalo			
Cost Management Products Available:	\$65,000		
TCO Manager Distributed Computing	\$75,000		
TCO Manager Distributed Computing Review	<del></del> \$95,00		
TCO Manager Distributed Computing Workshop	<del></del> \$115,0		
TCO Manager Data Network	\$130,0		
TCO Manager Data Network Review	<del></del> \$150,0		
TCO Manager Data Network Workshop	\$25,00	)0	
TCO Manager Voice Telecom			
TCO Manager Voice Telecom Review			
TCO Manager Voice Telecom Workshop		Deia	
TCO Manager Contact Center			ce per Nanagei
TCO Manager Contact Center Review	jer Plus		lus
TCO Manager Contact Center Workshop	view	l .	kshop
TCO Manager Help Desk	#####	###	#####
TCO Manager Help Desk Review	#####	###	#####
TCO Manager Help Desk Workshop	#####		#####
TCO Manager Enterprise Center Operations	####		#####
TCO Manager Enterprise Operations Center Review	#####	###	#####
TCO Manager Enterprise Operations CenterWorkshop	urrent	i	

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Decision Tools for Investment Planning				
\$'s USD	User (internal Use)			
Users (up to)	Single Model	Stratetgic Model		
3	\$6,000	\$9,000		
5	\$8,000	\$ 1 2 ,0 <b>0 0</b>		
10	\$12,000	\$18,000		
25	\$20,000	\$30,000		
50	Special Bid	Special Bid		
100	Special Bid	Special Bid		
> 100	Special Bid	Special Bid		

#### **Total Value of Opportunity Pricing:**

TVO for the end user is priced at \$35,000 for first license. Additional licenses are available for \$4,500 each. Additional licenses may be purchased for any user within the account. Additional licenses are not required to be in the same geography as the first license.

Price includes training at a Gartner designated site. Training can be provided at the client location if client agrees to pay for Gartner travel expenses. The number of people eligible for training is equal to the number of licenses purchased.

Licenses are for 12 months.

#### **GARTNER COMMUNITY**

#### **Symposium and Theme Tickets**

Theme: \$1,000Symposium: \$2,500

#### **Executive Programs**

All base prices are annual fees based on two-year term. One-year agreements are available at 10% above the base price.

		<b>EXP Premier</b>	EXP Club
2 Year Membership (Annual Price)		\$29,750	\$51,000
Additio	onal Members		
•	Second member	-10%	-10%
•	3 <sup>rd</sup> and beyond	-15%	-15%

## GARTNER News TALKING TECHNOLOGY/BUSINESS AUDIOTAPES

Any Combination of Talking Technology (TTS) and/or Talking Business (TTB)				
Licensed	License Fee	Add'l		
Listeners 1		Listeners	1	
3 (Minimum)	\$1,500	\$500	per each add'l listener	
5	\$2,250	\$450	per each add'l listener	
10	\$4,000	\$400	per each add'l listener	
15	\$6,000	\$400	per each add'l listener	
20	\$7,500	\$375	per each add'l listener	
50	\$13,500	\$270	per each add'l listener	
100	\$27,000	\$270	per each add'l listener	
150	\$40,000	\$270	per each add'l listener	
200	\$45,000	\$225	per each add'l listener	
500	\$75,000	\$150	per each add'l listener	
500+	Request Pricing	Request Pricing		

# FAULKNER INFORMATION SERVICES (12 PAGES)

## FAULKNER INFORMATION SERVICES GSA DISCOUNTED PRICE OFFERING

GS-02F-0131N • June 13, 2003 – June 12, 2004 GSA Schedule 76

<b>FACCTS</b>	Special
Web or CD ROM	GSA Discounted
User Licenses	Price
Single User	\$4,883
Add'l Users	\$514/ea
Workstation	\$8,170
10 User	\$8,713
Add'l Users	\$298/ea
	\$2507 <b>ca</b>
Site (Small)	\$17,431
(Up to 50 Users)	
Site (Large)	\$28,873
(up to 100 Users)	,
Enterprise	\$49,027
(up to 250 Users)	•
Add'l Users**	\$90/ea
	Ψ20/ <b>C</b> 0

<sup>\*\*</sup>Additional quantity discount of 2% for 350 or more users; and 5% 1,000 or more users

#### **NOTES:**

- 1. The discounts being offered to GSA represent the lowest price offered to any class of customer.
- 2. Revised March 1, 2004 to reflect reduction of Industrial Funding Fee by .025%
- 3. FACCTS is an acronym for Faulkner's Advisory on Computer and Communications Technologies information service covering the computer and communications industry



118 Cooper Center 7905 Browning Road, Pennsauken, NJ 08109 Phone: 856-662-2070 • Fax: 856-662-0905

> E-Mail: faulkner@faulkner.com Web: www.faulkner.com

Visit us at the GSA Advantage web site: www.fss.gsa.gov

We accept ALL government issued credit cards, including the Smart Pay card.

#### V. COST (3.6)

These prices are the SAME as those being offered to the General Services Administration (GSA). Contract number: GSO2F0035J. Effective Date: July 30, 1999. End Date: July 29, 2004. Maximum order: \$1,000,000.

Faulkner Advisory on Computer and Communications Technologies (FACCTS) Web-Version.

#### **User Licenses**

- 1. Single User: \$4,539.00 Additional Users: \$475.00 each
- 2. Workstation: \$7,575.00
- 3. Ten (10) Users: \$8,080.00 Additional Users: \$277.00 each
- 4. Site (Small Up to fifty (50) Users): \$16,160.00
- 5. Site (Large Up to one hundred (100) Users): \$26,765.00
- 6. Enterprise (Up to two hundred fifty (250) Users): \$45,450.00

NOTE: Additional quantity discount of 2% for 350 or more users; and 5% for 1000 or more users.

#### II. Project Support

#### PROJECT SUPPORT (3.3)

The Faulkner Advisory on Computer and Communications Technologies (FACCTS) is a fully searchable web-based management reports library that covers the full spectrum of computer system, software, networking, and telecom technologies – including trends, vendor strategies, and product solutions. All FACCTS reports and supporting publications are prepared and written by an expert team of analysts, researchers, and technology specialists.

FACCTS reports and supporting publications examine the critical trends, market conditions, products, services, and manufacturers that are spear-heading the ever-changing IT and converging communications landscape. FACCTS reports and supporting publications are most commonly used for tracking technology advancements and trends, strategic planning, competitive analysis, market awareness, product implementation support, vendor and product/service evaluation, and educating technical staffers and technology end-users. FACCTS reports cover 100% of the vendors who have products or services representing 90% of the installations in the United States. In addition, FACCTS reports cover emerging technology developers whom have especially innovative products and/or services and others who are regularly capturing the headlines in the trade and business press.

FACCTS reports and supporting publications can be accessed online at the Faulkner web-site around the clock – seven days per week, twenty-four hours a day.

#### III. Company Information and Staffing

#### COMPANY INFORMATION AND STAFFING (3.4)

Faulkner Information Services is an important player in the information publishing/communications arena – a pioneer of dynamically updated reference services covering the computer and communications industries with a credible 35-plus years of experience. The Faulkner Advisory on Computers and Communications Technologies (FACCTS) is the company's Cornerstone service.

We believe our FACCTS service to be more comprehensive and timelier than most in our class, and unbiased, containing hundreds of in-depth reports covering the products, services, vendors, issues, and trends that most interest corporate America, as well as government and large educational institutions. In addition, FACCTS offers specifications and summaries on thousands of hardware and software products, as well as news and analysis of important industry events, in order to provide our clients with a more encompassing service.

The FACCTS database is updated monthly. During the monthly update cycles, new reports are added and existing reports are updated as changes in technology and product offerings dictate. Each report in the FACCTS database is updated at least once per year.

FACCTS contains more than one dozen report types and support publications. all reports offer an abundance of sole-source information focusing on both domestic and global markets.

Technology Tutorials provide straightforward intelligence about key technologies. They fully explain specific technologies, discuss their importance in the workplace, explore future development issues, and outline critical implementation issues. In addition, they describe the market in terms of its size and associated vendors and cite the products using that technology.

Comparison and Selection Guides offer users the intelligence they need to make the appropriate choices about commercially available IT and communications products, services, and suppliers.

Implementation Guides provide users with the necessary knowledge to get a project up and running and keep it on track.

Marketplace Reports provide valuable insight about the most talked about technologies and offer a window into their future.

Company Profile Reports review the product development and business goals, sales and marketing strategies, competitive position, and financial situation of the leading IT and communications product and service suppliers.

Standards and Protocols Reports examine the major standards and protocols currently in-place and help you understand the real and potential impact they may have on your business.

Service Profile Reports offer users a look into the wealth of service offerings available in today's high-technology marketplace.

Product Profile Reports provide a straightforward summary of the leading IT and communications products available, closely examining their strengths and limitations, their current pricing strategies, and the competitive position of the manufacturer.

Face-Off Reports examine competing products head-to-head as they vie for position in the marketplace.

Timeline Reports provide capsule information about the leading players in the IT and communications arena – including quarterly financial performance, merger and acquisition activity, product development plans, advertising and marketing strategies, changes in management, and more.

Directories provide addresses, phone numbers, company contacts, and "hot" web links for all major vendors featured in FACCTS.

Glossaries define acronyms, terms, and abbreviations for all major IT and communications technologies.

Case Study Reports spotlight select organizations that are making important strides in their business.

#### SUPPORT PUBLICATIONS

Cyberscape Digest - daily news alert providing summaries of the day's top internet and technology related stories.

Telecom Weekly – an outline of the week's news and events shaping the telecom marketplace.

Faulkner Flash – a biweekly news alert service that provides detailed abstracts on all significantly newsworthy items across the spectrum of computers and communications.

The FACCTS database is easy to navigate (it employs the EXCITE search engine) and finding the right reports is equally efficient. Users may browse the database by subject area, report and/or support publication type, or by simply adding a query in the search window. Full Boolean operators and syntax are also supported.

Help Desk support is available during normal business hours (Monday through Friday, 9:00 AM to 5:00 PM EST) to answer questions about how to locate, compare, and organize reports on specific technologies, products, and suppliers, or to answer search engine related questions.

FACCTS reports and support publications are prepared and written by accomplished professionals who share an expansive knowledge of the IT and communications marketplace.

We would describe the ultimate value of our FACCTS service in these ways -

BY WHAT WE DO – we are industry watchers, trackers and reporters; our expertise in data collection, assimilation, and analysis allows us to manage the information glut for our clients.

-- Busy IT professionals and technology end-users don't have the time to read the many published materials from hundreds of sources in order to stay on top of the constantly changing technology landscape; think of the resources an organization would need to put in place in order to duplicate the information contained in the FACCTS database...it's priced at far less than the cost of a full time, dedicated researcher, and SIGNIFICANTLY less than a private consultant.

BY PROVIDING RELIABLE, CONCISE, AND CONSISTENT REPORTS that are fully searchable and always accessible – 7 days per week, 24 hours per day (holidays included).

### IV. Information on Advisory Services (3.5)

# INFORMATION ON TECHNICAL REFERENCE, REPORTING, AND ADVISORY SERVICES (3.5.1)

Faulkner's "ADVISORY" service, the Faulkner Advisory on Computer and Communications Technologies (FACCTS), offers reports that cover many of areas outlined in section "A" of the RFP (Subject Matter Expertise).

The FACCTS database is comprised of twelve interrelated subject modules. Each module contains a collection of reports pertinent to the subject matter. Shown below are the twelve subject modules, along with a representative sampling of the reports found under each category.

### 1. Managing Networked Systems (sample report titles below)

- Contingency Planning for the Enterprise
- Directory Enabled Networks Technology
- IP-Based Virtual Private Networks
- Remote Access Server Technology ·
- Troubleshooting the Enterprise Backbone
- Web-Based Enterprise Management Market Trends
- Developing Site-to-Site VPNs
- Face-Off: Network Anti-Virus Packages
- Simple Network Management Protocol (SNMP)
- Network Operating Systems Comparison & Selection Guide
- Advanced Intelligent Network (AIN)
- Biometric Security Technology
- CPE-Based Network Restoral Options
- Digital Subscriber Line (xDSL) Market Trends
- Implementing and Maintaining an Intranet

### 2. Information Security Strategies (sample report titles below)

- Alternatives for Secure Online Transactions
- Smart Cards Tutorial
- VSAT Technology, Management, and Disaster Recovery
- E-Commerce Security
- Web Site Security Guidelines: Protecting Against Hackers
- Face-Off: UNIX vs. Windows NT/2000 Security Issues
- Common Data Security Architecture (CDSA)
- Secure Server Environments
- Authentication Products Comparison & Selection Guide
- Storage Management Software Comparison & Selection Guide

### 3. Electronic Business Strategies (sample report titles below)

- Business-to-Business E-Commerce
- E-Commerce and the Government: Electronic Service Delivery
- Java-Based Application Development Technology
- Supply-Chain Management
- The Business Case for VoIP
- Wireless Internet Access
- Public Key Encryption
- Electronic Data Interchange and Internet Commerce
- Turnkey Solutions for E-Business
- Enabling E-commerce with XML
- Internet Standards and Controlling Bodies
- Face-Off: Legacy CRM vs. ASP-Hosted CRM
- Enterprise Resource Planning Comparison & Selection Guide
- Gated Sites: Development Issues and Guidelines

### 4. Internet Strategies (sample report titles below)

- Alternative Exchange Points: Colocation Facilities
- BGP Route Flaps and Their Impact
- Comparing HTML and XML
- Establishing a Mirror Site
- IP Multicasting Technology
- Multicast Backbone (Mbone) Monitoring Tools
- Tier 1 US National Internet Backbone Providers
- Faxing Over the Internet
- B2B: Vertical Trading Communities Market Trends
- Internet Service Level Agreements Market Trends
- Pacific Rim ISPs: State of the Marketplace
- Delivering IP Over Optical Networks
- ISDN Fundamentals
- Internet Usage Demographics

### 5. Strategic Data Management (sample report titles below)

- Enterprise Management Systems
- Outsourcing IT Services
- Outsourcing the Help Desk
- Troubleshooting the Enterprise Backbone
- Chip Technology Issues and Trends
- Face-Off: ERP Software
- Face-Off: ATM vs. Gigabit Ethernet
- Intranets Versus Collaborative Software

- Enterprise Information Portals Comparison & Selection Guide
- A Guide to Outsourcing ERP Systems
- Benefits of Middleware Deployment
- Constructing a Data Warehouse
- Data Analysis and Data Mining
- Global IT Practices and Procedures
- IP Switching
- On-Line Transaction Processing

### 6. IT Asset Management (sample report titles below)

- ERP vs. Best-of-Breed Applications
- Training Users for ERP Applications
- Integrating Customer Relationship Management with ERP Systems
- HRMS Market Trends
- Face-Off: ERP Software
- CRM Market Trends
- Biometric Security Technology
- Secure Server Environments
- Information Security and the US Government
- Developing Site-to-Site VPNs
- Advanced Intelligent Network (AIN)
- Distributed DBMS Technologies
- Carrier Service Testing Technologies
- IT Industry Certification Options and Benefits
- Fiber-Optics Technology Basics
- Introduction to Fibre Channel

### 7. Application Development (sample report titles below)

- Object-Oriented Technology
- Structured Methods for Software Development
- Outsourcing Alternatives for Web Development
- Unified Modeling Language
- CASE Technology
- Geographical Information Systems (GIS)
- Middleware Market Trends
- Developing Web-Based Multimedia Content with SMIL

### 8. Web Site Management (sample report titles below)

- Faxing Over the Internet
- Host Access Management
- Implementing an Internet Call Center

- Web Site Quality Control Technology
- Listserver Alternatives
- Intranet Management Tools Market Trends
- Implementing Web-Based Electronic Data Interchange (EDI)
- Choosing a Web Design Firm
- Country Codes
- Public Key Encryption
- Web-Based Videoconferencing
- V-Commerce Alliance Initiative
- Using XML for Document Management

### 9. Converging Communications (sample report titles below)

- Alternatives for Integrated Voice, Data Networks
- Broadband or Third-Generation Wireless Networks
- CO Equipment for CLEC Service Provisioning
- CPE-Based Network Restoral Options
- Carrier Managed VPN Services
- Carrier-Based WAN Restoral Solutions
- Computer Telephony Integration Market Trends
- Distance Learning Market Trends
- Evolution of US Phone Service: From Monopoly to Competitive Environment
- Global Telecommunications Alliances
- Inverse Multiplexing
- Managing Enterprise Messaging
- Next Generation Networks
- Remotely Dispersed Call Centers
- SONET Technology Service Level Agreements for the Enterprise
- Telemanagement Systems

## 10. Telecom & Global Network Services (sample report titles below)

- Frame Relay Basics
- WDM/DWDM
- Face-Off: Terabit Routers
- Asynchronous Transfer Mode Standards
- Frame Relay Access Device (FRAD) Comparison & Selection Guide
- Emerging Telecom Competition in Europe
- Telecommunications in China
- Telecommunications in Japan
- Telecommunications in the Middle East
- Telecommunications in the UK

- Telecommunications in the Former Soviet Republics
- Telecommunications in Latin America
- Telecommunications in Spain
- Telecommunications in Western Europe

# 11. Mobile Business Strategies (sample report titles below)

- Constructing a Secure Enterprise Network: Remote Security
- Remote Access Technology
- Infrastructure Requirements for Supporting Remote Access Users
- Bluetooth Initiative
- Global Positioning System
- Wireless PBX Systems
- Wireless Infrastructure Technologies
- Telemetry Market Trends
- US Wireless Telecommunications Market Trends
- Wireless LAN Market Trends

## 12. Wireless Communications (sample report titles below)

- Satellite Communications
- VSAT Technology, Management, and Disaster Recovery
- Teleports and the Internet
- Low Earth Orbit Satellite Technologies and Trends
- Home Networking Market Trends
- Telemetry Applications
- Wireless Standards and Protocols

### V. COST (3.6)

These prices are the SAME as those being offered to the General Services Administration (GSA). Contract number: GSO2F0035J. Effective Date: July 30, 1999. End Date: July 29, 2004. Maximum order: \$1,000,000.

Faulkner Advisory on Computer and Communications Technologies (FACCTS) Web-Version.

### User Licenses

1. Single User: \$4,539.00

Additional Users: \$475.00 each

2. Workstation: \$7,575.00

3. Ten (10) Users: \$8,080.00 Additional Users: \$277.00 each

4. Site (Small - Up to fifty (50) Users): \$16,160.00

5. Site (Large - Up to one hundred (100) Users): \$26,765.00

6. Enterprise (Up to two hundred fifty (250) Users): \$45,450.00

NOTE: Additional quantity discount of 2% for 350 or more users; and 5% for 1000 or more users.

# META GROUP, INC. (6 PAGES)

### II. PROJECT SUPPORT

### The META Group Solution

The Company addresses the growing demand for user-focused guidance by providing vendor-neutral IT research, analysis and advice to substantial commercial and governmental users of IT. META Group services are also utilized by IT vendors for help in product positioning, marketing and market planning as well as for internal IT decision making. META Group Research and Advisory Services assist clients in making more informed, timely and cost-effective decisions in the context of the clients' business and technology environments. Each Research and Advisory service is highly focused on enhancing the client's ability to reduce and/or contain the cost of IT, reduce risk, assess vendor business practices and strategies, evaluate products and technologies, negotiate with vendors, develop financial strategies and formulate IT architectures and strategic plans.

Our ability to delivery and meet client requirements starts with comprehensive review of client deliverables and analyst response time in delivery and service.

META Group - Standard Deliverables for the Research & Advisory Services:

(The following deliverables, which involve the direct participation of META Group research analysts, are provided to subscribers to META Group's Research and Advisory Services as an integral part of such services)

- <u>Telephone Consultations</u> afford each subscriber the unlimited opportunity to discuss specific issues with META Group analysts.
- Half-day Briefings are held at META Group headquarters or at client sites and address client-specific issues.
- <u>Strategic Plan Reviews</u> provide META Group analysis and evaluation of clients' strategic plans.
- <u>META Trends Teleconferences</u> are held quarterly by each service to provide an indepth analysis of between two and four of that service's annual META Trends (i.e. long-term projections of major industry issues and trends that META Group believes will impact users, vendors and the IT market).
- Key Event Teleconferences enable clients to participate in discussions with META Group analysts and are generally held following key industry events, such as major announcements or trade shows.
- META Group Conferences & Executive Sessions address a broad range of tactical and strategic issues relevant to each service. A conference covering industry-wide issues is held annually.

### • Written Research

Each subscriber to a META Group Research and Advisory service receives one or more of the following written materials:

- META Deltas consist of three to four analytical briefs, published monthly, that deliver analysis of major events, issues, vendor products and strategies, technology and other pertinent matters.
- META Faxes are concise faxed summaries of META Group's weekly research meeting, at which industry events are reviewed and analyzed.

- META Trends is an annual publication featuring three to five year projections of significant issues and developments that will affect IT users and vendors
- META Flash is a faxed bulletin containing analysis of key industry events or announcements which META Group deems to be of extraordinary importance.

META Group research is available in print, as well as in the media below. A rolling three years of research can be searched by service, topic, or keyword.

- Extranet
- Internet
- Lotus Notes
- CD-ROM

In addition, META Group's, Electronic Government Strategies (EGS), service offers a 20-to-1 client to analyst ratio, Government Trend Teleconferences, and a customized research agenda tailored to your specific issues.

META Group maintains a 50-to-1 client to analyst ratio in are other service offerings. This model was built for high touch, in-context analysis, which is META Group's brand.

### Hours of Operations and Response Time

META Group is committed to providing a high level of client service as defined by response time, clarity of advice and quality of communication. META Group analyst respond to clients' inquires and concerns as they arise, and analyst compensation is based in part on client inquiry response times. Analysts' regular contact with clients through telephone consultations, briefings and conferences also provides the Company with feedback which is used in the enhancement of its services. In addition, the META Group research library frequently performs supporting client-specific topical searches on particular IT issues. The Company maintains a key issues database that identifies areas of particular concern to clients and regularly uses customer satisfaction surveys to refine and enhance the quality of the services it provides.

Clients are assigned a Client Services Manager, responsible for processing inquires and arranging teleconferences (TC's) with analyst. In Hawaii, our clients can call and talk directly with client services between the hours of 2:00 AM - 2:00 PM, Hawaiian time. The fact of the matter is META Group is a virtual organization. Teleconferences, inquire correspondence, on-line research etc. is 24/7.

META Group has its own "meeting place" telephone access system for audio-conferencing. The client calls a toll free number, a bridge ID number is assigned, which makes it convenient and efficient for clients and analyst to discuss their IT issues/inquires.

### **Summary of Project Support**

A.	Types of media access:	Extranet, Internet, Lotus Notes, CD-ROM, hard copy and if request on diskettes. We do offer video streaming on the web and video teleconferencing on request.
В.	Response time:	Pre-arranged analyst talk time is 24/7, access to written research is 24/7. Client Services hours of operations are from 2:00 AM – 2:00 PM, Hawaiian time. Sales Director and Relationship Manager are always accessible.
C.	Telephone Access:	All teleconferences (TC's) are placed though an internal system called, "Meeting Place".
D.	Audio-conferencing:	Audio-conferencing is a standard way for us to delivery "in-context" analysis & research.
E.	Hours of Operation:	META Group operates as a 'virtual' organization. The word virtual implies our in-context analysis of client issues are only limited to our client's hours of operation.

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### V. COST

META Group's prices are based on a consistent and fare pricing policy. For State of Hawaii, RFP No. 01-041-SW, our GSA or government price list is submitted for the proposed services. This GSA schedule is applied to all government clients within META Group. This pricing structure has been specifically designed to meet the budgetary requirements of the public sector and has been significantly discounted from our private sector price list.

This schedule is designed to help assist our government client's in managing resources, while providing flexible options, all designed to help achieve IT goals and initiatives. For illustration on pricing, please refer to the example provided in this section on how the State of Hawaii may purchase proposed services, using the GSA Price Schedule.

The deliverables for each service are found in Section - VI and were also referenced in Section II - Project Support.

Please note, META Group does not include travel expenses in our pricing. Travel expenses would be billed to the State at government per-diem rates (airfare, hotel, meals, rental car). META Group Publications are not listed on the Government Price List because all publications are viewed as an annual subscription. Therefore please refer to the government discount rates provided, in Section – VI, under the heading of Publications. Also, please take note that there have been recent name changes to some Advisory Services. They are as follows:

#### New Name

- 1. Electronic Business Strategies (EBS)
- 2. Server Infrastructure Strategies (SIS)
- 3. Web & Collaboration Strategies (WCS)

### Old Name

Advanced Information Management Strategies (AIMS) Services & System Management Strategies (SSMS) Workgroup Computing Strategies (WCS)

7 "Core" Advisory Services	GSA Pricing
Application Delivery Strategies (ADS)	\$16,262,00
Electronic Business Strategies (EBS)	\$16,262.00
Enterprise Data Center Strategies (EDCS)	\$16,262.00
Global Networking Strategies (GNS)	\$16,262.00
Server Infrasturucture Strategies (SIS)	\$16,262.00
Service Management Strategies (SMS)	\$16,262.00
Web & Collaboration Strategies (WCS)	\$16,262.00
Sub-total	\$113,834.00
Executive Advisory Services	
Enterprise Architecture Strategies (EAS)	\$27,474.00
Electronic Government Strategies (EGS)	\$21,464.00
Sub-total	\$48,938.00
Total	\$162,772.00



**GSA Price List** 

1/99

### **Retainer Services**

### "INsights" & "INfusion"

META Group's subscription service "INsights" and "INfusion" bundles are designed to help clients make faster IT decisions.

### Core Technology & Industry Services

- Applications Delivery Strategies (ADS)
- Advanced Information Management Strategies (AIMS)
- Enterprise Data Center Strategies (EDCS)
- Energy Information Strategies (EIS)
- Global Networking Strategies (GNS)
- Healthcare Information Technology Strategies (HITS)
- Insurance Information Strategies (IIS)
- Open Computing & Server Strategies (OCSS)
- Services & Systems Management Strategies (SSMS)
- Workgroup Computing Strategies (WCS)

### Annual Retainer Fee Per Service

User Organizations:

\$18.121\*\*\*

Above w/o Half-day Briefing:

\$15,757\*\*\*

Research Only Per Service:

\$ 4.797

Additional Half-day Briefing:

\$ 4,318

INfusion Bundle:

\$15,353\*\*

### Architecture Development Service

• Enterprise Architecture Strategies (EAS)

#### Annual Retainer Fee

User Organizations:

\$27,474

### CIO Council Service

META Executive Council (MEC)

### Annual Retainer Fee

User Organizations:

\$21,464

#### Measurement Service

• IT Performance Engineering & Measurement Strategies (PEMS)

### Annual Retainer Fee

User Organizations:

\$42,929

- \* META Group's "INforum" publications are not included in this schedule.
- \*\* INfusion Bundles require subscription to other core technology service(s).
- \*\*\* Volume Discounts Available, See Page 55

### Consulting

### "INitiatives"

META Group Consulting "INitiatives" provide dedicated analysis in the context of your business and industry to solve your most difficult and mission-critical IT issues.

### Consulting INitiatives Practice Areas

#### 1. Value Realization

- Industry targeted IT strategies, business cases, and action plans
- Enterprise architectures and value models
- Organization and capability development
- Value measurement and delivery

### 2. Sourcing

- Sourcing business case development to establish effective "make vs. buy" decision frameworks
- Procurement Assistance across all aspects of information technology
- Deal structures and negotiation assistance
- Governance and supplier management

### 3. Application and Program Delivery

- Value assurance on major enterprise programs (e.g., Y2k, ERP)
- Business Performance Management (data warehouse, data mining, knowledge management)
- Component architectures/Re-use strategies
- Package selection and integration planning

### 4. Infrastructure Planning, Operations, and Support

- Architecting, extending and securing the IP platform
- Customer support (desktop, help desk, & call centers)
- Data center and infrastructure consolidation
- Performance and Process Benchmarking/Cost of Ownership studies

#### 5. Customer and Market Value

- Market validation and customer value testing
- Market opportunity analysis
- Competitive assessment and product/service positioning

### INitiatives Projects Quoted by Request

Daily Fee Per Consultant:

**\$2,575** 

#### Benchmarks

- Data Center
- Customer Interaction Center
- Network

Fee Per Benchmark:

\$34,343



# Volume Discounts on Core Technology & Industry Services

Number of Services	Fee Per <u>Service</u>	With out Half-day <u>Briefing</u>	<u>Discount</u>
1	\$18,121	\$15,757	22%
2 to 4	\$16,959	\$14,747	27%
5+	\$16,262	\$14,141	30%